



2026 PERSONAL TAX INFORMATION CHECKLIST

Check each item that applies and upload supporting documents through our secure portal.

Client name _____
Phone _____

Email _____
Address changed ☐ Yes ☐ No

1 CHANGES AND LIFE EVENTS

- | | |
|--|--|
| ☐ Address/contact information changed | ☐ Started or ended a business |
| ☐ Marital status changed (include date) | ☐ Moved for work or school |
| ☐ New child or dependant | ☐ Received inheritance/foreign distribution |
| ☐ Dependant information changed | ☐ U.S. or other foreign filing may be required |
| ☐ Residency status changed | ☐ Major accessibility or multigenerational renovation |
| ☐ Purchased or sold a home | ☐ None of the above |

2 INCOME AND TAX SLIPS

EMPLOYMENT & BENEFITS

- ☐ T4 employment income
- ☐ T4E employment insurance
- ☐ T4A and other income slips
- ☐ Workers compensation/social assistance
- ☐ Stock option information

PENSIONS & SAVINGS

- ☐ T4A(OAS)
- ☐ T4A(P) CPP benefits
- ☐ Other pension slips
- ☐ T4RSP/T4RIF withdrawals
- ☐ Annuity income

INVESTMENTS & OTHER

- ☐ T3 trust income
- ☐ T5 interest/dividends
- ☐ T5013 partnership income
- ☐ Foreign income/tax paid
- ☐ Scholarships/bursaries
- ☐ Support payments received

3 INVESTMENTS AND PROPERTY SOLD

- | | |
|--|--|
| ☐ Stocks, ETFs or mutual funds | ☐ Rental/vacation real estate |
| ☐ Cryptocurrency/digital assets | ☐ Principal residence |
| ☐ Private company shares | ☐ Other capital property |

Provide realized gain/loss reports, sale documents, and original cost information. For a principal residence, include the address, year acquired, sale date and proceeds.

4 BUSINESS AND RENTAL ACTIVITIES

- | | |
|--|---|
| ☐ Self-employment income and expenses | ☐ Asset purchases and sales |
| ☐ Rental property income and expenses | ☐ Vehicle use and kilometre log |
| ☐ Short-term rental income | ☐ HST information, if applicable |



2026 PERSONAL TAX INFORMATION CHECKLIST

5 DEDUCTIONS AND CREDITS

SAVINGS & EMPLOYMENT

- ☐ RRSP receipts
- ☐ FHSA contributions/withdrawals
- ☐ T10, if received
- ☐ Signed T2200
- ☐ Employment vehicle expenses
- ☐ Home office/cell phone expenses
- ☐ Union/professional dues

FAMILY & EDUCATION

- ☐ Childcare receipts/provider details
- ☐ T2202 tuition slip
- ☐ Student loan interest
- ☐ Adoption expenses
- ☐ Support payments and agreement
- ☐ Moving expenses

MEDICAL & GIVING

- ☐ Medical/dental summaries
- ☐ Private health plan premiums
- ☐ Travel medical insurance
- ☐ T2201 disability certificate
- ☐ Attendant care expenses
- ☐ Donation receipts
- ☐ Donations of securities
- ☐ Political contributions

6 FOREIGN PROPERTY AND CROSS-BORDER MATTERS

- Specified foreign property cost exceeded CAD \$100,000 at any time in 2026 ☐ Yes ☐ No
- Received income, distributions or loans from a foreign trust/entity ☐ Yes ☐ No
- Owned or controlled an interest in a foreign corporation/partnership/business ☐ Yes ☐ No
- May be required to file a U.S. or other foreign tax return ☐ Yes ☐ No

7 TAX PAYMENTS AND OTHER INFORMATION

- ☐ 2026 personal tax instalments
- ☐ CRA reassessment/review correspondence
- ☐ Investment advice fees or interest
- ☐ Loss on private company investment
- ☐ New/changed support arrangement
- ☐ Other significant item not listed

Total 2026 instalments paid: \$ _____

8 FINAL REVIEW

- ☐ All tax slips and RRSP/FHSA receipts included
- ☐ Investment sale and cost information included
- ☐ Medical, donation, childcare and tuition documents included
- ☐ Foreign property questions answered
- ☐ Business and rental summaries complete
- ☐ Tax instalment details included
- ☐ Checklist completed
- ☐ Documents uploaded through secure portal

COMMENTS OR QUESTIONS FOR OUR TEAM

This checklist is a general guide and may not include every item relevant to your circumstances. Contact us if you are unsure whether information should be provided.